



# Effective Techniques for communicating and managing communication

Learner Manual



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## How to communicate with each other

When we say the word, "communication," what do you think of? Many people will think of the spoken word. People who are hearing impaired, however, might think of sign language. People who are visually impaired might think of Braille as well as sounds.

In this section, we will explore the different ways in which we communicate.

### What is Communication?

Lets start by looking at the dictionaries definition of communication,

**"the imparting or interchange of thoughts, opinions, or information by speech, writing, or signs."**

It is also defined as,

**"means of sending messages, orders, etc., including telephone, telegraph, radio, and television,"**

Communication is very powerful; it can bring us comfort or pain, sadness or joy in only a few words, pictures or gestures.

It can affect our productivity in the workplace, help us solve problems and achieve our goals.

It was once said that the pen is mightier than the sword, and that's just one form of communication!

### How Do We Communicate?

The three major ways we communicate are:

- **Spoken:** There are two components to spoken communication.
  - **Verbal:** This is what you are saying.
  - **Paraverbal:** This means how you say it – your tone, speed, pitch, and volume.
- **Non-Verbal:** These are the gestures and body language that accompany your words. Some examples: arms folded across your chest, tracing circles in the air, tapping your feet, or having a hunched-over posture.
- **Written:** Communication can also take place via fax, e-mail, or written word.



### Who's listening?

It's of little use conveying the best written speech in the world, to an empty room! For communication to be effective we need to target our communication, which means deciding on the most effective medium for the audience.

There are three factors regarding communication that we need to consider.

- **Method:** The method in which the communicator shares his or her message is important as it has an effect on the message itself. Face to face or over the phone? Can it be done online?
- **Mass:** The number of people receiving the message. This could be between one and millions.
- **Audience:** The person or people receiving the message affect the message, too. Their understanding of the topic and the way in which they receive the message can affect how it is interpreted and understood.





## Paraverbal Communication Skills

Paraverbal communication refers to the messages that we transmit through the tone, pitch, and pacing of our voices. It is *how we say something*, not *what we say*.

It has been said that paraverbal message accounts for approximately 38% of what is communicated.

A sentence can convey entirely different meanings depending on the emphasis on words and the tone of voice.

For example say out loud the following phrase three times, each time emphasise the word highlighted.

1. I didn't **say** you were stupid - (Implying they never said it)
2. I didn't say **you** were stupid - (Implying they were talking about someone else)
3. I didn't say you were **stupid** - (Implying you got it wrong, followed by an insult)

Some points to remember about our paraverbal communication:

- When we are angry or excited, our speech tends to become more rapid and higher pitched.
- When we are bored or feeling down, our speech tends to slow and take on a monotone quality.
- When we are feeling defensive, our speech is often abrupt.



### The Power of Pitch

Be conscious of the pitch of your voice whilst speaking. A high pitched voice is often interpreted as anxious or upset. A low pitch is more serious and authoritative.

If you naturally speak in a very high-pitched or low-pitched voice, work on varying your pitch to encompass all ranges of pitch. (One easy way to do this is to relax your throat when speaking.) Make sure to pay attention to your body when doing this – you don't want to damage your vocal cords.



### The Power of Tone

Have you ever thought to yourself or said, "I don't like the tone of their voice!" If you have you were identifying the power of tone first hand. It is the combination of various pitches which create a mood.

An example of a positive creation of mood by tone is any Barry White song, with his deep tone style of singing. In this example some say the tone creates a mood of love and romance.

Tone is like music during a movie, you don't consciously listen to it, but it builds tension or eases it. The tone in which we speak adds a third dimension to what we are saying.

Here are some tips on creating a positive, authoritative tone.

- Try lowering the pitch of your voice a little.
- Smiling will warm up your voice.
- Monitor your inner monologue. Negative thinking will seep into the tone of your voice.
- Try and put yourself in the mood you wish to project.



### Vocal Speed Camera

There are times when speaking quickly is required, an auctioneer for example. You may not catch every word, but because the bidding is pretty logical, it goes up in increments, you can work out what's going on. If the auctioneer was speak at conversational place we would be there all day, especially if the item we wanted to bid on was at the end.

Usually however speaking at an auctioneers pace during normal conversation would not be appropriate. People would not understand what you were saying, not to mention the power of tone being totally absent. A little like watching a move in fast forward, you would certainly get the idea of the story but the emotions and depth of the story line would be completely missed.

The same can be said for speaking too slowly, you would probably lose the audience's interest before you get very far at all!

Try to speak at a moderate pace, this will help the listener focus on your message, and give you enough time to consider tone and pitch.

One easy way to check your pitch, tone, and speed is to record yourself speaking. Think of how you would feel listening to your own voice. Work on speaking the way you would like to be spoken to.



## Non-Verbal Communication

The subject of non-verbal communication could not only cover another course but could cover years of study and practice.

Let's look at a few examples of non-verbal communication and how these non-verbal messages affect the verbal message?

- **Your manager asks you to step into her office to discuss your application for promotion.**
- Non-verbal body language description 1 - She looks stern and her arms are crossed.
- Non-verbal body language description 2 - She is smiling and looks relaxed.
- Non-verbal body language description 3 - Doesn't lift her head as she calls from her desk.
- Non-verbal body language description 4 - As you walk in she slams the door behind you.



Same message, four different interpretations.

In our following discussions, remember that interpretations are just that. (For example, the person sitting with his or her legs crossed may simply be more comfortable that way, and not feeling closed-minded towards the discussion.

Body language can also mean different things across different genders and cultures.)

However, it is good to understand how various behaviours are often seen, so that we can make sure our body is sending the same message as our mouth.

With this in mind, let's look at the components of non-verbal communication.

### Your Body Speaks its own Language

The term Body Language is a very broad term to describe the way in which our physical actions reflect our mood and feelings. Much of the time we produce these signals unconsciously, which is a positive when you are trying to gauge someone's true reaction, but can be a negative when you are trying to hide your own.

We have included a few gestures which you will come across on a regular basis in your professional and personal life.

More importantly, be aware of your own use of them.

#### 1. Boredom



The hand *supports* the head; the degree to which the hand supports the head reflects the level of tedium in picture 1. The head is heavily supported (facial features look crumpled) indicating extreme boredom.

#### 2. Evaluation



Evaluation gestures include a closed hand *resting* on the cheek, this shows the person is interested in what is being discussed. Often the index finger will be pointing vertically upwards on the side of the head.

### 3. Chin Stroking



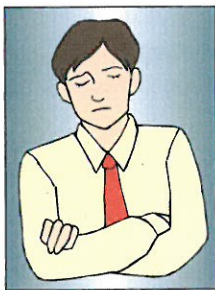
Often following on from evaluation gestures, chin stroking signifies decision-making, we should take a back seat here and let the person come to their conclusions uninterrupted. What happens directly after chin stroking (decision making) will give the greatest clues to the nature of that decision.

### 4. Ready for action



Standing hands on hips indicates that the person wants to take positive action in response to what they're discussing (not to be confused with the aggressive hands on hips in order to appear imposing - obviously an angry person is ready to take action of a different sort).

### 5. Arm barriers



Arms crossed (unless the person is very cold or lounging in a chair), indicates a blocking action - resistance to what is being said, if accompanied by a blank expression they're simply not listening.

### 6. Clenched fist



#### Clenched fist

- a) when arms are crossed
- b) when the unclenched hand is placed over the other holding it down, symbolically restraining the aggressive gesture

This indicates that the true feelings a person holds – they really don't like what's being said.

### 7. Clasped hands



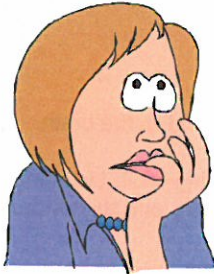
Clasped hands in front of the body as a protective barrier are a sign of nervousness or insecurity.

Holding hands with one's self in front of the body is comforting in unfamiliar or stressful circumstances.

One arm placed across the front of the body clasping the other, is also a sign that a person is uncomfortable or lacking in confidence in a particular situation (such as standing before a crowd or a group of unknown people).

Conversely hands clasped behind one's back (often with head up and chin out) signify confidence or superiority – people in authority often use this gesture.

### 8. Fingers in the mouth



Fingers, and objects such as pens, and cigarettes placed in the mouth are a sign of anxiety. Babies are comforted and soothed by sucking on thumbs and dummies etc and this gesture is a mimic of that need for comfort.

### 9. Both hands behind the head



Both hands behind the head is a gesture of superiority, it demonstrates a degree of 'smugness', which tends to annoy the person or people it is aimed at.

This gesture can also intimate that the man is laying claim to territory.

The position of the man's legs (referred to as a leg lock) also indicates his feelings of superiority

### 10. Openness



Exposed palms signify openness and honesty, it is a submissive gesture indicating that the person has nothing to hide. This common gesture is used extensively by dodgy sales people, Watch out.....

Concealed palms suggest that the person is hiding something or concealing the truth.



## Listening Skills

Listening is one of the most important skills you can have. How well you listen has a major impact on your job effectiveness, and on the quality of your relationships with others.

- We listen to obtain information.
- We listen to understand.
- We listen for enjoyment.
- We listen to learn.

Given all this listening we do, you would think we'd be good at it! In fact we're not. Depending on the study being quoted, we remember a dismal 25-50% of what we hear. That means that when you talk to your boss, colleagues, customers or spouse for 10 minutes, they only really hear 2½-5 minutes of the conversation.

Turn it around and it reveals that when you are receiving directions or being presented with information, you aren't hearing the whole message either. You hope the important parts are captured in your 25- 50%, but what if they're not?

In this section of the workshop we learn how to listen and listen actively.



### Ten Ways to Listen Better Today

Listening and hearing are two different concepts. Hearing is the human body's ability to register sound in the brain.

Listening, on the other hand, is our conscience effort in understanding what is being heard and acting on it. Listening is the process of looking at the words and the other factors around the words (such as our non-verbal communication), and then interpreting the entire message.

Listening requires focus on what is being said so processing of the information can take place. We can easily default to hearing if we are not careful. For example, you may be talking with someone and your eyes start focusing on the TV in the background. Once your eyes become disengaged from the talker, you are most likely in hearing mode.

Here are ten things that you can do to start becoming a better listener right now. Pick a few of them and write them in your action plan.

1. When you're listening, listen. Don't talk on the phone, text message, or do anything else.
2. Avoid interruptions. If you think of something that needs to be done, make a mental or written note of it and forget about it until the conversation is over.
3. Aim to spend at least 90% of your time listening and less than 10% of your time talking.
4. When you do talk, make sure it's related to what the other person is saying. Questions to clarify, expand, and probe for more information will be key tools. (We'll look at questioning skills later on in the workshop.)
5. Do not offer advice unless the other person asks you for it. If you are not sure what they want, ask!
6. Make sure the physical environment is conducive to listening. Try to reduce noise and distractions. ("Would you mind stepping into my office where I can hear you better?" is a great line to use.)
7. If it is a conversation where you are required to take notes, try not to let the note-taking disturb the flow of the conversation. If you need a moment to catch up, choose an appropriate moment to ask for a break.
8. Keep eye contact.
9. Summarise the conversation, this will ensure you have understood the message correctly.
10. Turn your body towards the person you are listening, show that you are focused on what they have to say.

## Understanding Active Listening

Although hearing is a passive activity, one must listen actively to listen effectively, and to actually hear what is being said. There are five key elements of active listening. They all help you ensure that you hear the other person, and that the other person knows you are hearing what they are saying.

### 1. Pay attention.

Give the speaker your undivided attention and acknowledge the message. Recognise that what is not said also speaks loudly.

- Look at the speaker directly.
- Put aside distracting thoughts. Don't mentally prepare a rebuttal!
- Avoid being distracted by environmental factors.
- "Listen" to the speaker's body language.
- Refrain from side conversations when listening in a group setting.

### 2. Show that you are listening.

Use your own body language and gestures to convey your attention.

- Nod occasionally.
- Smile and use other facial expressions.
- Note your posture and make sure it is open and inviting.
- Encourage the speaker to continue with small verbal comments like yes, and uh huh.

### 3. Provide feedback.

Our personal filters, assumptions, judgments, and beliefs can distort what we hear. As a listener, your role is to understand what is being said. This may require you to reflect what is being said and ask questions.

- Reflect what has been said by paraphrasing. "What I'm hearing is..." and "Sounds like you are saying..." are great ways to reflect back.
- Ask questions to clarify certain points. "What do you mean when you say..." "Is this what you mean?"
- Summarise the speaker's comments periodically.

### 4. Defer judgment.

Interrupting is a waste of time. It frustrates the speaker and limits full understanding of the message.

- Allow the speaker to finish.
- Don't interrupt with counter-arguments.

### 5. Respond Appropriately.

Active listening is a model for respect and understanding. You are gaining information and perspective. You add nothing by attacking the speaker or otherwise putting him or her down.

- Be candid, open, and honest in your response.
- Assert your opinions respectfully.
- Treat the other person as he or she would want to be treated.

## Sending Positive Signals to Others

When we are listening to others speak, there are three kinds of cues that we can give the other person.

Using the right kind of cue at the right time is crucial for keeping good communication going.

- **NON-VERBAL:** Head nods and an interested facial expression will show the speaker that you are listening.
- **QUASI-VERBAL:** Fillers words like, "uh-huh," and "mm-hmmm," show the speaker that you are awake and interested in the conversation.
- **VERBAL:** Asking open questions using the six roots discussed earlier (who, what, where, when, why, how), paraphrasing, and asking summary questions, are all key tools for active listening.
- These cues should be used as part of active listening. Inserting an occasional, "uh-huh," during a conversation may fool the person that you are communicating with them in the short term, but you're fooling yourself if you feel that this is an effective communication approach.





## Asking Good Questions

Good questioning skills are another building block of successful communication. We have already encountered several possible scenarios where questions helped us gather information, clarify facts, and communicate with others.

In this section, we will look closer at these questioning techniques that you can use throughout the communication process.

### Asking Open Questions

When possible, use the five W's or the H to ask a question.

- Who?
- What?
- Where?
- When?
- Why?
- How?

These questions encourage discussion, self-evaluation, and open conversation.

Some useful questions include:

- What happened?
- Why do you feel that way?
- When did this problem start?
- How does that make you feel?
- Who else is involved?



### Closed Questions

**Definition:** There are two definitions that are used to describe closed questions. A common definition is:

*"A closed question can be answered with either a single word or a short phrase".*

A more limiting definition is:

*"A closed question can be answered with either 'yes' or 'no'".*

Closed questions have the following characteristics:

- They give you *facts*.
- They are easy to answer.
- They are quick to answer.
- They keep control of the conversation with the questioner.

This makes closed questions useful in the following situations:

Usage	Example
As opening questions in a conversation, as it makes it easy for the other person to answer, and doesn't force them to reveal too much about themselves.	It's great weather, isn't it? <i>Where do you live?</i> <i>What time is it?</i>
For testing their understanding (asking yes/no questions). This is also a great way to break into a long ramble.	So, you want to move into our apartment, with your own bedroom and bathroom?
For setting up a desired positive or negative frame of mind in them (asking successive questions with obvious answers either yes or no ).	Are you happy with your current supplier? <i>Do they give you all that you need?</i> <i>Would you like to find a better supplier?</i>
For achieving closure of a persuasion (seeking yes to the big question).	<i>If I can deliver this tomorrow, will you sign for it now?</i>

Note how you can turn any opinion into a closed question that forces a yes or no by adding tag questions, such as "isn't it?", "don't you?" or "can't they?" to any statement.

The first word of a question sets up the dynamic of the closed question, signalling the easy answer ahead. Note how these are words like: do, would, are, will, if.

Although closed questions tend to shut down communication, they can be useful if you are searching for a particular piece of information, or winding a conversation down.



If you use a closed question and it shuts down the conversation prematurely, simply use an open-ended question to get things started again. Here is an example:

- Did you see the AFL grand final?
- Yes.
- What team do you support?

## Probing Questions

In addition to the basic open and closed questions, there is also a toolbox of probing questions that we can use. These questions can be open or closed, but each type serves a specific purpose.

### Clarification

When the person you are talking to is vague or have not given enough information, seek to further understand them by asking for clarification.

Clarification questions often look like this:

- "Please tell me more about..."
- "What did you mean by..."
- "What does ... look like?"

### Completeness and Correctness

You can check that they are giving you a full and accurate account by probing for more detail and checking against other information you have.

Sometimes people make genuine errors, which you may want to check. Some examples of these questions include:

- "What else happened after that?"
- "Did that end the ..."
- "How do you know that is true?"

### Relevance

If they seem to be going off-topic, you can check whether what they are saying is relevant to the main purpose of inquiry.

Some good ways to frame relevance questions are:

- "How is that like..."
- "How does that relate to..."

### Drilling Down

Use these types of questions to nail down vague statements.

Useful helpers include:

- "Describe..."
- "What do you mean by...?"
- "Could you please give an example?"

### Evaluation

To discover both how judgmental they are and how they evaluate, use evaluative question:

- How good would you say it is?
- How do you know it is worthless?
- What are the pros and cons of this situation?

### Emotional

Particularly if they are talking in the third person or otherwise unemotionally and you want to find out how they feel, you can ask something like:

- And how did you feel about that?

### Summarising

These questions are framed more like a statement. They pull together all the relevant points. They can be used to confirm to the listener that you heard what was said, and to give them an opportunity to correct any misunderstandings. Example:

- "So you picked out a dress, had to get it fitted three times, and missed the wedding in the end?"

Be careful not to avoid repeating the speaker's words back to them like a parrot. Remember, paraphrasing means repeating what you think the speaker said in your own words.

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## Advanced Communication Skills

During this workshop, we have learned a lot about communication. We would like to wrap things up with a brief discussion on a few advanced communication topics.

Adding these skills to your toolbox and using them regularly will make you a more efficient, effective, communicator.

### Precipitating Factors

Something that you need to consider is the mood of the person you wish to communicate with. We have all had good and bad days, on a particularly good day; everything may go your way and make you feel like you're on top of the world. But on a bad day, unfortunate events can likewise snowball, increasing their negative effect exponentially.

For example, imagine how each of these events would make you feel if they happened to you first thing in the morning.

- You encounter long delays due to road works on the way to work.
- Your alarm clock doesn't go off.
- You are out of milk.
- The cafeteria line is very long.

Each of those things is potentially responsible for creating an awful morning. Now, imagine this scenario:

You wake up and realise your alarm clock hasn't gone off and you're already late. You get up and go to turn the coffee pot on, but you realise that there is no coffee left in your house. Then, you shower and head out the door – only to encounter construction and massive traffic back-ups on the way to work.

Now you're 15 minutes late instead of five. You get to work and head to the cafeteria for some much-needed coffee, but the line stretches out the door.

With the addition of each event, your morning just gets worse and worse. For most people, this is a recipe for disaster – the first person that crosses them is likely to get an earful!

Successful communicators are excellent at identifying precipitating factors and adjusting their approach before the communication starts, or during it. Understanding the power of precipitating factors can also help you de-personalise negative comments. This does not mean that someone having a bad day gets to dump on everyone around them; it does mean, however, that the person being dumped on can take it less personally and help the other person work through their problems.

### Common Ground

Finding common ties can be a powerful communication tool. Think of those times when a stranger turns out not to be a stranger – that the person next to you on the train grew up in the same town that you did, or that the co-worker you never really liked enjoys woodworking as much as you do.

Whenever you are communicating with someone, whether it is a basic conversation, a problem-solving session, or a team meeting, try to find ways in which you are alike. Focusing on positive connections will help you build stronger relationships and better communication.





## WRITTEN COMMUNICATION - THE BUILDING BLOCKS

Before we get to creating documents, we need to cover some fundamentals. Master these, and you will be able to construct the most common business documents.

### Spelling and Grammar

This brief module discusses spelling and grammar and preventing common issues. It is surprising how often certain words are misspelled or misused in everyday business.

#### Spelling

As we've mentioned at the start of the Activity, it is very important that your business documents are correctly spelled. Even your business e-mails should be correctly spelled – you don't know where or to whom they might be forwarded.

Poor spelling can reflect badly on your professional image and that of your company, and can also lead to misinterpretation.

Tips to improve spelling:

1. Familiarise yourself with commonly misused words, particularly sets of words often mistaken for each other.

*Example: Affect vs. Effect*

**Affect** is to influence or change. (The harvest has been affected by poor weather.)

**Effect** is the outcome or result. It can also mean 'to cause'. (The drought has had a dramatic effect on food prices.)

This problem also happens with pronouns or pronoun-linking verb contractions which sound alike. Examples: who's vs. whose, their vs. they're (and there) and your vs. you're.

2. Make sure you pronounce words properly. Colloquial pronunciations can cause people to omit certain letters in writing. Example: writing 'diffrence' instead of 'difference' because many people pronounce this word with a silent first e.
3. Note some friendly rules on spelling. Example: / before e, except after c when the sound is 'ee' (e.g. receive, belief)
4. If you're writing for an international audience, note that there are spelling variations in the different kinds of English. The biggest variations are generally US and UK English. Leaving out the u, as in harbour vs. harbor; using -re instead of -er, as in centre vs. center; using -se instead of -ze, as in analyse vs. analyze (and all the variations of 's' vs 'z').
5. Lastly, use spelling resources. These days, spell checking is as easy as running a spell check command on your word processing software. But be careful, especially if you know you must use UK rather than US spelling. Spell checkers can be wrong, and they will not pick up typing errors where a legitimate word has been used, e.g 'form' instead of 'from'. If you're still uncertain after an electronic spell check, consult a dictionary.





## Grammar

Grammatical errors in a business document can reflect negatively on you and/or your company. You should always check, and if possible get someone else to check, your document before sending it out.

We have three grammar issues most business writers have trouble with. Your readers may not necessarily notice them either, but it's best if you are aware of them.

NOTE: All grammatical rules discussed here have exceptions and complex forms, we are not trying to cover everything.

### 1. Subject-verb agreement

The basic rule states that a **singular subject takes a singular verb, while a plural subject takes a plural verb**. How do you know whether the subject is singular or plural? Also, verbs do not form their plurals by adding an s as nouns do. Which verb would you use with he or she and which verb would you use with they? Example - "he drives" therefore, drives is singular, "they drive" therefore, drive is plural.

NOTE – when you refer to an organisation by name, you treat it as *singular*.

Where might this occur in business writing? "ACME Company **is** delighted to respond to your request"; "Neither the chairman nor the secretary **is** available on that date"; "The CEO and CFO **are** attending a conference". As a general rule, use a plural verb with two or more subjects when they are connected by *and*.

Lots of additional rules available here - <http://www.grammarbook.com/grammar/subjectVerbAgree.asp> - and from many other sources. Note that sometimes it is easier to restructure your sentence than to apply the rules correctly.

### 2. Verb tenses

Modern English has six tenses, each of which has a corresponding continuous tense. (Example, Present Continuous tense is 'I am speaking', 'you are standing' etc. Continuous tense typically has a verb ending with '-ing'). The present, past and future tenses don't usually create issues in writing, although please ensure that you keep them consistent.

The tenses that can lead to writing issues are known as perfect, past perfect, and future perfect. These are formed using the verbs *have*, *has*, and *had*. They are important because they can completely change the sense of what you are trying to convey.

- *Perfect tense* is used to express an event that happened in the past, but still has an effect on the present. Example: Mr John Jones *has managed* this organisation for the past 3 years.
- *Past perfect tense* is used to express an event that took place before another action, also in the past. Example: Miss Smith *had been waiting* for several hours before the plane arrived.
- *Future perfect tense* is used to express an event that will have taken place at some time in the future. Example: We *will have finished* our dinner by the time you arrive.

Generally the type of document you are writing will dictate the tense to be used. Business cases are often written in future tense, but can also have past or present tense when describing the problem to be addressed. The purpose of a report might be to discuss how a project *was* executed, or to propose how it *would be* executed.

You can also vary the tenses within the same business document if required. For example, if you were proposing a change to a business process, you might describe it in the present tense, "the clerk receives the mail, opens it and scans it into the Document Management system for electronic delivery".

### 3. It's and its

"Its" is the possessive, third person, singular adjective, typically referring to something other than a person. For example, "The machine spread its claws."

"It's", short for 'It is' or 'it has'. The apostrophe represents one or more missing letters. For example "It's the fastest engine for this job."

*Note* – this rule can be confusing, as it is the opposite of the normal 'possessive' rule. For example, in "Robert's shoes are black" the apostrophe indicates the possessive.

## Language and tone

Words and language are the most important component of your writing. You don't need a fabulous vocabulary or a great turn of phrase, but you *must* use the words properly – and not too many of them.

### Clarity

Language has to be clear. Sometimes misuse causes confusion, sometimes it just causes irritation – and you don't want to irritate your readers. It's usually not enough to write so that you can be understood – you need to ensure you won't be misunderstood.

"If language is not correct, then what is said is not what is meant; if what is said is not what is meant, then what ought to be done remains undone." *Confucius*

- Don't use long words or phrases where short ones will do – "precipitation" instead of "rain", "all personnel will endeavour" instead of "we will try".
- Avoid tautologies – needless repetition of the same sense in different words. Examples "new innovation", "Helpful assistance".
- Avoid clichés like the plague.....
- Use active rather than passive voice where possible – "the crisis was averted" is not as powerful as "we averted the crisis". You can't always avoid using the passive, but at least be conscious of it.

### Conciseness

Keep your language simple, don't use long words just for the sake of it. You are not writing an English essay where you have to impress your teacher with your vocabulary. Keep your sentences short, avoid long, rambling prose. Remember, you must keep your reader's attention, they are generally very busy people.

### Formality

Keep your document as formal as is required. Generally you will assess the degree of formality based on:

- the seniority of your primary audience,
- the gravity of the situation, and
- the type of relationship between you/your company (or the person on whose behalf you are writing) and the primary audience.

### Focus

Your document is generally about a single topic. Inform your audience *as soon as possible* what that topic is. The first sentence is a good place. Stay focused on that topic, do not digress into other areas. Check every sentence and paragraph – if it is not relevant to the topic, remove it. As noted above regarding conciseness, do not go off at tangents. They may be very interesting to you, but you will lose your audience – literally.

### Tone

The tone of your document is also important. You want to be positive, and appreciative of your audience. You need to keep it business-focused, not too casual. The degree of formality depends on the audience you are expecting, but in general you should avoid slang.

If your document is a report, or a proposal/business case, or similar documents where you may be articulating existing issues/problems, stick to the facts and keep the tone unemotional. Generally, allocation of blame/responsibility for issues is not your role, so you need to be careful. This is one situation where you may end up making considerable use of passive rather than active voice.





## Sentences and Paragraphs

The first part of this module is a brief refresher on the parts of a sentence and proper punctuation, the remainder is about paragraphs.

### Parts of a Sentence

When writing for business/formal documents, you must use complete sentences. Remember that a complete sentence usually has three parts: a subject, a predicate and an object. In some sentences you may have only a subject and a predicate.

The subject is the person or thing carrying out the action. It is usually a noun or pronoun. The predicate is typically indicated by a verb, ie the action being carried out. The object is the person or thing upon whom/which the action is being carried out.

*Example:*

"The project manager recommends a delay."

The subject is 'The project manager', the predicate is 'recommends', the object is 'a delay'.

### Sentence Length

Remember that you are not writing a novel. Make your document clear by keeping the sentences short. Generally, letters and e-mails and memos should have an average sentence length of about 15 words. More formal reports and documents can have longer sentences – they don't have to – of about 20 words on average. This is where your punctuation becomes important.

Note that sometimes you may need to restructure a paragraph to reduce the sentence length.

Before	After
High quality learning environments are a necessary precondition for facilitation and enhancement of the ongoing learning process.	Children need good schools if they are to learn properly.
If there are any points on which you require explanation or further particulars we shall be glad to furnish such additional details as may be required by telephone.	If you have any questions, please phone.
It is important that you shall read the notes, advice and information detailed opposite then complete the form overleaf (all sections) prior to its immediate return to the Council by way of the envelope provided.	Please read the notes opposite before you fill in the form. Then send it back to us as soon as possible in the envelope provided.

### Punctuation

Punctuation is the standard symbols/marks in writing used to separate words, phrases and sentences. The use of punctuation affects a text's readability, flow and meaning. Many business writers seem to forget to insert any punctuation, making the reader do a lot of work to interpret their document. Your objective should be to make life as easy as possible for the reader, because usually you want something from them.

Commonly used punctuation includes:

- Period/full stop (.) – used to end a sentence. Periods are also generally used after initials and abbreviations.
- Question Mark (?) – used after a question.
- Exclamation Point (!) – used after statements expressed with strong emotion.
- Comma (,) – used to separate items in a series. Also used before and, but, or, nor, for, so, and yet, when they join independent clauses (unless the clauses are short). It is also used to separate items that interrupt a series.
- Colon (:) – used to mean "note what follows," and is typically succeeded by an elaboration, summation, interpretation of what it precedes. A colon is often used at the end of the introductory phrase of a bulleted list.
- Apostrophe (') – used to show possessive case, or to indicate the omission of letters in a word.
- Semicolon (;) - used to link independent clauses not joined by a coordinating conjunction. Semi-colons are often used in bulleted lists.





## Paragraphs

A good, well-thought out paragraph structure can make a significant difference to the reader's perception and understanding of your document. There must be a logical flow – in the reader's mind – and the reader must understand as quickly as possible *what* they are reading and *why* it is important.

You must also consider that what is important to you – the writer – may not be deemed important by the reader, so you need to think carefully about the degree of detail you include. Remember, you usually want or need something from the reader, typically approval/agreement or support of some kind, so you have to keep them interested.

Remember the general rules about paragraph structure that you learned in school – topic sentence, supporting sentence, closing sentence. This structure is also very applicable to the overall organisation of sections within a document, and the document itself, in other words, introductory paragraph(s), detailed paragraph(s), closing paragraph(s). We will cover this shortly.

It is generally useful to start a new paragraph whenever it is logically possible – think about how the document will look when displayed on screen or printed. There is little more off-putting to a reader than a document that consists of very long paragraphs.



## Organisation and Structure

There are many techniques for structuring your thoughts/ideas before you begin the detailed work on your content. Some people favour developing the Table of Contents – assuming your document will be long enough for a TOC – before beginning to write. Some people use mind-mapping techniques or tools. Your organisation may have a standard template to be used for particular documents.



## Organisation Approach

Regardless of what you eventually write, there are some things you should do before you start.

1. Determine the purpose of your document – a proposal, a report, a business case, whatever. Having done that, ensure that the reader knows the purpose of the document as soon as possible. The title is a good place to do this – for example “Business Case for the Implementation of Time Recording in XYZ department”; “Review of Project XYZ, and Recommendations”. This will also help keep you focused.
2. Having determined the purpose, consider your key messages, not too many. For example, if you are writing a proposal you may want to make it crystal clear that you understand the problem and can help the company address it. It can be useful to brainstorm this, either by yourself or with a team.
3. Consider the other information you must include, such as references, resumes, timeframes, examples, or supporting information.
4. Consider the use of diagrams/graphs/pictures/tables. They can make your document much clearer and reduce confusion. They can also reduce the amount you have to write. Even a brief memo can be made crystal clear through the use of a table.
5. Having done all of the above, work out the structure of your document. Create the title for each section. If you already have a template, consider the titles of each section and amend them if necessary. Titles must be meaningful to the topic at hand – make them informative rather than generic. Think about how they will look in a Table of Contents – will they provide information to the reader? Remove any unnecessary sections.
6. Organise your material into the relevant sections. If you don’t have a ‘home’ for something that needs to be included, consider changing a title or adding a new section.
7. For each section, structure your material in a logical manner – logical to the *reader*. Create meaningful sub-section headings, decide how you are going to get any material you are missing.
8. Start writing

Obviously, some of the steps above will be very brief for shorter documents, but the approach remains similar.



## Tools and Techniques

During this section of the workshop we look at a few extra tools and techniques.

### The Reader

The reader is the most important participant in this whole exercise. You need to be aware of who they are/ are likely to be, and of what is going to be important *to them* from your document. Typically for business documents your reader is going to be a senior person with decision-making power for your proposals/recommendations/business case – and very little time. (The main exception to this is documents which are designed as communication mechanisms and/or baselines. Examples include functional design documents in a systems development project, or business processes/procedures.)



Your typical reader is therefore going to wish to know, very quickly, why this document deserves their attention. You can take care of this by structuring your document so that you pre-empt any questions they might have. This doesn't mean that you have to write a very long document, it just means you must be focused. It can also mean that you structure your document in reverse.

Business documents are not like the essays / reports you would have developed in school/college, where you marshal your arguments and then provide a conclusion. For your readers' sake, you may want to present your conclusion/recommendations early in the document – possibly just after you have stated the problem/opportunity. Then you can present your rationale. If your document is very long, consider also having an Executive Summary – we will discuss this later.

If you know that you are going to have multiple 'types' of reader, for example executives (requiring a summary only) and operational or technical staff who need detail, you might structure your document into several parts. The first part is the Executive Summary. The second part is the document proper. The third part is the Appendices, where you can put all of the very detailed information that may only be of interest to a few people. This kind of structure helps with the flow in the main part of the document, as you can avoid getting bogged down in detail. This approach is also useful when the document is being developed by more than one person.

### The Requirement

Are you crystal clear about *why* you are writing this document? The Reader section discusses the reader's perspective, but what about yours/your organisations/your boss's?

Ensure that you know what your company wants this document to achieve. You may find yourself preparing to write a proposal without being at all aware of, for example, how badly your organisation wants – or doesn't want – the business.

You may start writing a proposal when what was actually required was a request for an initial discussion. You may be sending an e-mail postponing a business meeting without understanding that it must be rescheduled in the following week. You may be sending a request for a suitable meeting time when what is needed is a scheduled appointment with an agenda attached.

You must ensure that you understand exactly what the requirement is. This may mean you need to ask questions – don't be afraid to ask them. It would be worse to waste time going in the wrong direction. Typically the person to answer the questions is the one on whose behalf you are writing.

### Write faster – effective writing

The Organisation Approach discussed the structure of your document, and getting started. You also need to think about getting finished.

- Avoid long sentences and paragraphs, use bullets and headings effectively. You can save yourself – and your reader – a lot of time.
- You don't always have to write. It might be easier – and faster - to have a phone conversation and then follow up with a mail.
- If you have a useful example from similar interactions/requirements available, use it.
- Be appropriate – a written document/e-mail is not always the *correct* approach. Sometimes you need a phone or face-to-face conversation, for example for sensitive issues or personal information.
- THINK before you begin, but once you have started, especially on a long document, let it flow. Don't try to edit as you go, you can do that once you have finished writing. This does not mean you have to leave all of your editing until you have finished the document, just that you should not let it interfere with the writing itself.
- When you are finished, stop. Business documents are judged on quality, not quantity.



## Templates

Your organisation may have templates for various types of document. A template is a pre-defined structure. It can vary from a simple Table of Contents through to a detailed explanation of the content expected in each section. Templates may also include styles, fonts, headers and footers and company logos.

Templates are extremely useful, but ensure you are not constrained by them. You can usually delete or add sections as you require. Familiarise yourself with the various styles so that you can construct formal documents very quickly.

If your company doesn't have templates, find previous examples of your document (proposal, business case etc) that are considered to be good, and follow them.

If you have nothing available, create your own template, even if it is just headers, footers, fonts, and heading and paragraph styles. This can save you a lot of time in the future, as well as producing consistent documents.

## Proofreading

Once you have completed your document, you need to proofread and review/edit it. You may need to adjust your schedule so that your document gets proofread, reviewed and despatched in time.

Proofreading is a systematic check for spelling, punctuation, grammar and typing errors, and any inconsistencies such as font sizes, incorrect text styles, missing headers/footers etc. Generally you can get anyone to proofread your document, although you will probably find over time that some people are better than others.

It is *not* the same as editing/reviewing. You may find that you use/need a different set of people as reviewers. You need to allocate time for proofreading – both for yourself and for others. It is a deliberate activity. If you have a large document you may need to pre-warn your proofreaders – it can take several hours to proofread large documents. If you're proofreading your own material, leave a gap between writing and reading.

Try to look at or scan the words without letting your brain absorb them. Your brain will try to insert or correct information, and in this case you don't want it to do that.

Use spell checkers and grammar checkers as a first pass, but don't be dependent on them and don't accept suggested changes unless you are happy with them.

## Review/Peer Review

There are very few documents that don't benefit from a review. You *must* review your document before it is despatched, and edit as necessary. It is also very useful to get someone else to review it if you can. If your organisation has a formal review process, find out about it and ensure you follow it. You may need to adjust your schedule to include one or more review cycles.

The objective of a peer review is to provide constructive feedback to the author(s) of a document. The reviewers don't usually need any information other than the document itself. The feedback can be on any aspect of the document – appearance, style, 'readability', structure etc. Some reviewers will provide 'tracked changes' on an electronic document to make it easier to incorporate the edits. Be aware that you are not obliged to accept all changes – you need to consider whether they are appropriate.

Peer review is very useful, as it can highlight the strengths of your writing and the areas for improvement. You could request the same person to review several of your documents over time, acting as a mentor, and highlight to you where you are/are not improving. Be cautious – you want to develop your own style(s), not just slavishly follow someone else's.

Be aware that sometimes people will only provide the negative feedback in a review, especially if they are busy. You may need to make specific requests, e.g. 'can you let me know also what is working well in this document?', so that you continue to improve your documents. Keep notes of the feedback they provide to you and reference them when you create new documents.

## The Appearance - Printing and Publishing

In this electronic age, your audience may be reading your document on screen or in hard copy. You must ensure that it looks professional in both situations.

Some of this is addressed during your proofreading, but be aware of the following:

- Always check the 'print preview' to ensure that:
  - graphics and tables are in the right place – preferably centred rather than right/left adjusted;
  - headings are not separated from their associated text;
  - there is plenty of 'white space', ie pages are not crammed with text;
  - structure is easy to follow – numbered pages, numbered sections;
  - page breaks are appropriate, for example if you have only one line of text on a page you might edit so that it fits on the previous page; and
  - headers, footers and margins appear correctly.
- Be careful if you are using multiple printers, for example for printing large proposals. Some printer settings may change your page size/margins.
- For larger documents, ensure you have an *accurate* Table of Contents, and if necessary a Table of Figures and/or Table of Tables.
- For formal documents, ensure all diagrams/figures have captions, that the captions are numbered, and that the formatting of captions is consistent.
- If you can get the logo of the company to whom you are sending a proposal/report, use it – at least on the title page.

# THE DOCUMENTS

## Meeting Agendas - The Basic Structure

An agenda is essential to ensure that a meeting remains focused on the key topic(s), and that the desired outcomes are achieved.

The key information to be covered in an agenda is:

- Why are we meeting, i.e. the purpose?
- Where are we meeting?
- When are we meeting? And for how long?
- Who will be there, ie other invitees?
- What are the topics/areas for discussion?
- Is any preparation required?
- Must I attend (am I an optional or a required attendee)?



An agenda can be informal, via an e-mail just noting the above, or extremely formal. You have probably seen many examples of different types of agendas.

If there are multiple topics to be covered in the meeting, think about the following when determining the order:

- a) Generally, rank the topics in descending order of importance and urgency. This ensures that the crucial items get addressed.
- b) If this is a regular meeting, start with actions from the previous meeting.
- c) Combine items that are related and/or similar.
- d) Start with 'informational items' first, before items that require critical thinking and decision-making. Ideally, circulate information *with* the agenda to minimise the time spent on these items.
- e) Consider having an item called 'Actions' or 'Moving Forward'. This can be a useful mechanism to prompt that something needs to be *done*.
- f) Allow for 'Any Other Business' or 'Q&A' at the end.

If this meeting includes an attendee who only needs to be there for one topic, and/or is excluded from the other topics, consider placing that topic first on the agenda. An example is a senior management meeting with a presentation being provided by more junior personnel on one topic.

Try to limit meetings to 30 minutes or an hour – this is not always possible for formal meetings. For longer meetings, specify the time that will be spent on each topic.

If pre-reading has been provided, advise attendees that the meeting will assume that the material has been read. If you are providing pre-reading material, ensure you allow enough time before the meeting for attendees to have read the material.

Note that most organisations have electronic calendars which allow you to schedule appointments incorporating the date/time, duration and location as well as the subject. Your organisation may also have standard agenda templates for formal meetings.

Follow the guidelines provided earlier regarding the logical organisation of a document, meeting the readers' needs, and meeting your organisation's requirements.



## E-mails

E-mail is frequently used for business communications. While e-mails tend to be less formal than other business communications, you should adhere to the language and tone rules outlined previously.

You can use all of the techniques covered previously to ensure your e-mails are professional and effective.



### Addressing your mails

**The To:** line contains the people for whom the mail is intended, particularly those you need to take some action.

**The CC:** line can contain others for whom the e-mail content is of interest but who don't need to take any action.

**The BCC:** line is used to 'blind copy' anybody else you need to send the mail to, where you do not want others to be aware of who has received copies, or where people want to keep their e-mail address private. Be careful when using this, sometimes people do not realise that they were blind copied, and they may respond to the mail. The bcc is often used for convenience when a mail has to go to a very large group of people.

### Brevity

E-mails are expected to be brief and succinct. Ensure that the subject line explains what the mail is about – think of it as a title. Use short sentences, short paragraphs, and bullets if appropriate. Use headings if it helps get your point/needs across more quickly.

If your mail is going to be longer than a screen page, it may be more appropriate to create a document and attach it to a briefer e-mail, especially as many people print off e-mails. This also provides better formatting/structuring options for your content.

### Formality

You should adhere to the formality guidelines provided earlier. This applies to language, abbreviations, salutations, tone etc. Do not use the abbreviated language so common to phone messaging. Do not use all capitals or very large font, people tend to think you are SHOUTING.

Many organisations have a formal signature at the foot of their e-mails. Ensure that yours is correct and up to date. If you have moved to a new organisation/section or have gotten a new computer/new software, test that your correct signature actually gets attached to your mails.

### Attachments

When attachments are provided, reference each of them in the mail itself. You should also explain to your recipients what you need them – each of them, if necessary – to do with the attachments, and by when.

### Forwarding/replying

When replying to e-mails, consider carefully if you need to:

- a) Reply to All, or only to the sender, or to a limited list of the original recipients.
- b) Retain the full e-mail 'trail' – sometimes information is included in the history that is either not required or else counter-productive. Remember that everyone may not be following the same guidelines as you. Get rid of most of the disclaimers that tend to accumulate at the bottom of e-mail trails.
- c) Start a brand new e-mail rather than continuing the current trail.

If forwarding an e-mail – especially to a client – check the content carefully before forwarding, especially if it was a long trail. At the very least, there may be confidential information in the history.

## Business Letters

Business letters are a critical communications mechanism for your organisation, both internally and externally. They are formally structured, and unlike e-mails are almost always addressed to a single individual. They are often attached to an e-mail rather than posted.

In addition to the formal structure, business mails are usually on headed stationery, with the second and subsequent pages on different stationery. With modern laser printing, the formal logo, address etc. are usually generated electronically – very few companies now have specially headed letter paper.

However, some companies use a different quality paper for posted letters – be aware of this when you need to print your business letters. You may also need to print an envelope – ensure the address you use is the *postal* address, some companies use post-office boxes for mail.

Your company is likely to have a standard template for business letters, ensuring that the correct format and stationery are used. If it doesn't, find a previously used format for business letters and copy it.



## The Basic Structure

Business letters require a formal style. You can moderate the formality depending on the relationship with the recipient. Regardless of the content of the letter, you must maintain professional courtesy. Remember that a business letter often forms part of an official record that could be kept for many years.

A business letter typically contains the following:

- Company's full name and address – usually a standard part of the company letter template;
- Recipient's full name and address;
- Date of the letter;
- Formal Salutation e.g. "Dear Mr/Ms/Dr" etc. If you have a relationship already, it could be "Dear *firstname*";
- A Subject Heading e.g. "Re: Job Opening for Quality Control Officer". This is optional;
- Letter Body – following the guidelines and techniques from the earlier part of this course;
- Formal Closing, usually "Yours Sincerely";
- Name and Signature of the Sender (usually the person on whose behalf you are creating the letter). If you are signing for them you will put your own signature and place 'pp' in front of their typed name;
- Title of the Sender.

Try to keep it to a page. If the letter is longer than a page, ensure you use the correct stationery template for the subsequent pages.

## Writing the Letter

Tips on how to write a business letter:

1. Determine the purpose of your letter, and make it clear at the outset. It could be an announcement, a brief proposal, an enquiry, a complaint, or almost anything else.
2. Be courteous and diplomatic, even if it is a difficult or contentious topic. Think about how this letter would appear to someone who was not involved in the matter at hand.
3. Remember that correct spelling, grammar and punctuation are always important. Structure your letter carefully, try to keep it brief. Your recipient is probably a very busy person, and even if they are not, few people like to have their time wasted.
4. Tailor your letter so that it does not 'read' like a standard mail-shot. Put something specific to the company or person to whom you are writing in the content.



## Proposals

Business proposals are different to standard business correspondence and most other business reports. They are usually competitive, and are often being sent to companies that you have yet to do business with. It is critical that you provide the best possible view of your company's capabilities and performance. You must also remember that a proposal is almost always about providing a solution to somebody's problem. There is no point in telling them how wonderful your company is if you don't also show them *specifically* how your company can address their needs.



### The Basic Outline

For this topic we are going to focus on proposals which have been requested by an external organisation, i.e. where you are aware of the issues that your recipient is trying to address. *All* of the building blocks, tools and techniques we have covered earlier are required for proposal writing.

Remember the discussion earlier regarding your reader, and structuring the document in a way that will answer their questions. This is crucial for a business proposal. Usually the company requesting the proposals will have pre-determined evaluation criteria, and one set of those will relate to how well your proposal addresses their needs.

Remember also that in a proposal you need to present your company's credentials – expertise, performance, and often financial stability/viability – in detail. Most companies have standard information that can be used. Ensure that it is up to date.

The request for proposal may also require a specific structure in your response. Sometimes you can deviate from this, but if you need to it is wise to check with the people who will be evaluating your proposal. Major proposals may also contain draft contractual arrangements. Such large, formal proposals are usually handled by a team, and are outside the scope of this training.

### Key information

As with business letters, there are a number of standard topics/items of information that your proposal needs to cover:

- An Overview of your company
- A statement of the need/requirement that your proposal is addressing
- The Scope of your proposal:
  - What will be done
  - Who will do it
  - When it can be done, and how long it will take
  - Your approach, i.e. how this will be done (this is not always necessary, but demonstrates your company's expertise)
  - What will *not* be done, i.e. what is not included in this proposal
  - Who is involved from the requesting organisation
  - Any key assumptions you are making
  - How much it will cost.
- Contact Details – there may be more than one contact, e.g. for technical and business/commercial queries
- References – these may need to be quite detailed. Remember that some references cannot be used, as your business dealings with other organisations might be confidential. Also remember to check with any referees you are providing, to ensure that they are willing to speak to prospective clients about work your company has carried out for them.
- Marketing material – generally this should be kept to a minimum, and included as an appendix. You may want to reference it specifically – for example if it includes some case studies. Your company may want it included to demonstrate its breadth of activity. In any event you must consider carefully before including marketing material – and check it to ensure there is no conflict with the proposal.

### Sequence

The sequence in which you present your topics is very important in a proposal. Unless the Request from the customer dictates otherwise, you need to ensure that you demonstrate your understanding of their problems/challenges before you start to tell them about your wonderful company. The recommended broad sequence for a proposal- which could encompass many separate sections - is:

- Customer requirements;
- How you propose to meet their requirements;
- How long this will take, how much it will cost;
- Your credentials – resumés, references, case studies, financial viability.

Very detailed information can be provided in appendices – for example, some proposals might require very detailed resumés. You don't want to clutter up your document with these, so you would have a section or subsection with brief summaries of the resumés, which then referenced the relevant appendix.



## Choosing a Format

The previous exercise discussed the typical content of a proposal. Your format will vary, depending on the scope and complexity of the proposal. It might be a letter – no more than 1-2 pages – a document of a few pages, or a very large proposal requiring a team effort to respond.

Regardless of the scale, anything longer than a letter requires all of the content we have outlined previously, although the degree of detail will vary.

Letter proposals are usually to clients with whom you are already doing business- these generally don't require details about your company credentials/viability. Any more detailed information required can be provided in an Attachment to the letter. Follow the guidelines we have already covered for business letters.

## Proposal Structure and Content

It can be useful to think of a lot of business writing as a proposal. You are usually looking for something from the reader. Your proposal must be:

### 1. Focused on the recipient

Your recipient needs to be crystal clear that your company understands their needs completely. Tailor the proposal to the customer. Ensure content is not 'boiler plate' content – this is very easily spotted. If you are using another proposal as a template, ensure that the previous names do not appear.

It is also a useful exercise to count how many times your company name appears vs the recipient company name.

### 2. Substantiated

Don't make claims that you cannot back up. If you make statements about your company's capabilities or performance, provide evidence. The evidence could be brief descriptions of other projects, resumés of relevant personnel, client references, awards your company has received, or even financial information.

### 3. Differentiated

In competitive proposals, you need to decide what will make your proposal *different* from others – and then tell the customer. It might be one key point, or something which is referenced in every section.

### 4. Well Structured

Refer back to the previous modules about the structure of a document. Remember that your recipient will have already decided what their evaluation criteria are – and will often have told you. It is not just about price. You need to ensure that your proposal addresses all of their criteria in a logical and succinct manner.

## Executive Summaries

Executive summaries can be used for any long document, but they are especially useful in proposals, which is why we are covering them here.

An Executive Summary is a 1 to 2 page abstract of a document/report/proposal, targeted at senior management. It should not contain anything which is not explained in more detail in the document proper. It covers all of the main 'selling' points or highlights from the more detailed document. It can include tables and other figures – anything that will reduce the number of words. It must be written in business language.

The Executive Summary typically contains the same major headings as the main document, although you might omit some of the more detailed ones. If it's very brief, you might omit headings altogether, but your key messages must come through.

The Summary is often the only part of the proposal/document that an executive will read, or even see, so you must ensure that it grabs their attentions, and that all pertinent information is included. The techniques we have discussed previously with regard to the reader are very important when composing an Executive Summary.

The Summary does not have to follow the same order as your main document – a different order might be more appropriate and/or powerful. For example, you might list out your recommendations in a brief set of bullet points and then explain succinctly how they address *this* customer's needs.

There are some approaches to proposal writing, particularly for larger proposals, that advocate the creation of 'theme' statements for each section, with the Executive Summary comprising the combined theme statements. The theme statement is a succinct description of the *why* the content of the section is important. For example "Our proposed approach to this project will deliver benefits within 3 months" at the beginning of a section on the detailed approach. This technique, while extremely powerful and effective, requires detailed planning of the content and structure *before* commencing the proposal.



## Reports

Reports form a large part of business writing. They typically contain detailed information. They may be a record of a particular event or the outcome of a departmental/project review. They have typically been requested by someone.

Whatever the reason, the building blocks covered earlier are all relevant when compiling a report.



### Report Structure and format

A report is one of the situations where you are not necessarily trying to 'sell' something, although if it is the outcome of a review it might contain recommendations.

Generally you want to tell your audience:

- What this report is about;
- Why this report has been written;
- The approach taken to gather the content (if relevant, e.g. interviews, workshops, review of documentation);
- Main body, with detailed information as appropriate - facts, data, calculations, results;
- The findings and conclusions/recommendations as appropriate.

The tools and techniques discussed in sections four and five are relevant to report writing. Ensure that you understand what is expected in the report – this may require a conversation with the person requesting it. Remain objective, especially if the report requires conclusions to be drawn.

Many organisations have standard templates for the different forms of report/documentation. You can include an Executive Summary if required/appropriate. You may also need to include your own contact details.

## Business Cases

A business case is essentially an internal proposal. It seeks a commitment – usually funding – from the senior management of the organisation to address a specific challenge or opportunity.

The business case might be for the whole organisation or just one section. The actual challenge could be a new business process, an organisational restructure, a new system, replacement equipment, or staff training. All of these typically require investment by the company.



### Business Cases

Your organisation does not have an endless supply of funds, and choices have to be made regarding what the funds should be spent on. Additional expenditure usually needs to be justified. Some companies require a business case for any major or non-regular expenditure, with specific questions addressed. This is generally a good practice, as it ensures that the person requesting the commitment has thought it through. It also provides information for senior management to enable them to make investment decisions.

Note that the investment you are requesting is not always cash. It could be time – for training, for a new process, for meetings/workshops, for communication. For most companies, time equates to money, and your business case needs to show what value the company can expect from that investment. However, the people who will be *spending* their time also need to understand what return they will get – better skills, improved team morale etc.

You must ensure you are addressing the “what’s in it for me” question for those people who will be impacted if your business case succeeds – especially if they include the executives who will make the decision.

Your business case should contain:

- A succinct statement of the problem/challenge/opportunity;
- Detailed supporting evidence as required (some of this could be in an appendix);
- Several possible solution options, with advantages and disadvantages;
- The impact of maintaining the status quo (this could be addressed as one of the options);
- The recommended option, including some detailed planning;
- Financial and non-financial benefits, and when they will start to flow;
- Potential costs and timeframes.

As with proposals, the business case might be only a few pages or a significantly large document. You may need an Executive Summary. You must consider the most effective structure for your business case.



## General Documentation

The preceding modules have been about specific types of business documents. Your company also produces many documents which are more general in nature.



### General Documentation

In these situations, you will need to come up with a structure if there is no template or existing documentation to guide you.

The documents could be:

- Lists of requirements for a new system or process;
- Records of the proceedings of specific events;
- Lessons learned after a project;
- Documentation of business processes;
- Instructions;
- Etc etc.

You need to consider the tools and techniques discussed in the early part of this workshop. At a minimum, your document needs to provide:

- The purpose of the document;
- The intended audience; and
- The required detail – structured to suit the audience.

You might also need the contact details for additional information / queries.

### **Thanks**

It is sometimes, but not always, appropriate to provide formal thanks in your document. You may be thanking the potential client for the opportunity in a proposal, or thanking the staff of a particular department who provided lots of assistance with a business case.

Whenever you need to do it, ensure it is clear and ideally in a separate paragraph. It can be at the beginning or the end of the document, whichever is most appropriate – but generally *not* in an Executive Summary.

It doesn't need a separate heading unless there is a very long list of significant acknowledgments.

**Many thanks for your attendance and attention.**

## Words from the Wise

- **YOGI BERRA:** In theory there is no difference between theory and practice. In practice there is.
- **DWIGHT EISENHOWER:** Plans are nothing; planning is everything.

